

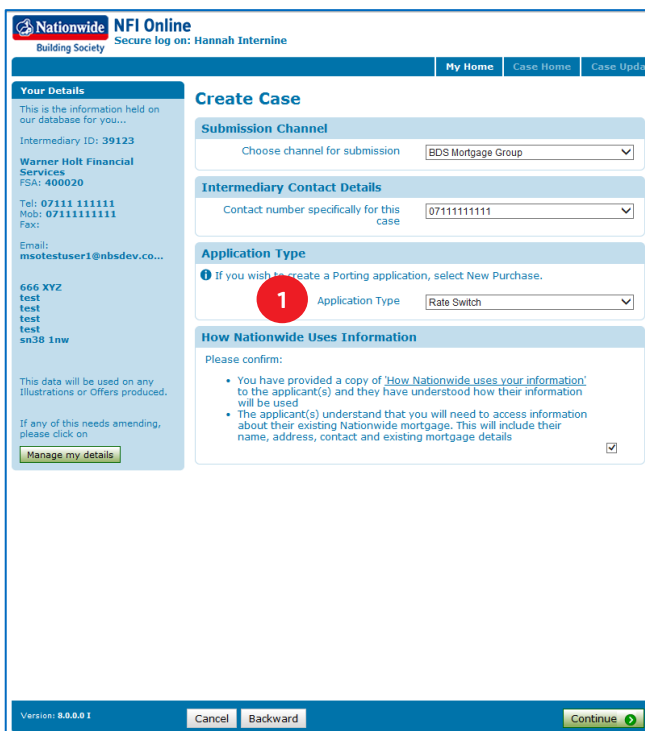
NFI Online

Rate Switch Keying Guide

This guide will assist you with keying a Rate Switch in NFI Online.

Note: The following application types can't be completed on NFI Online and should follow the paper exception process:

- Where there are more than two clients on the existing mortgage.
- Where your client is switching more than four accounts.
- Where your client is serving in the armed forces with a British Forces Post Office (BFPO) address and their property is currently let.



Nationwide NFI Online
Building Society Secure log on: Hannah Internine

My Home Case Home Case Update

Your Details
This is the information held on our database for you...
Intermediary ID: 39123
Warner Holt Financial Services
FSA: 400020
Tel: 07111 111111
Mob: 071111111111
Fax:
Email: msotestuser1@nbsdev.co...
666 XYZ
test
test
test
sn38 1nw

Create Case

Submission Channel
Choose channel for submission: BDS Mortgage Group

Intermediary Contact Details
Contact number specifically for this case: 071111111111

Application Type
If you wish to create a Porting application, select New Purchase.
1 Application Type: Rate Switch

How Nationwide Uses Information
Please confirm:
• You have provided a copy of 'How Nationwide uses your information' to the applicant(s) and they have understood how their information will be used.
• The applicant(s) understand that you will need to access information about their existing Nationwide mortgage. This will include their name, address, contact and existing mortgage details.

Version: 8.0.0.0.1 Cancel Backward Continue

After logging in to NFI Online, click 'Create new case'.

- 1 After completing the first few questions, select 'Rate Switch' from the Application Type drop-down menu.

Click 'Continue' to proceed.

Create Case

Applicant Details

1 Surname

Forename

Date of birth / /

Security Address Postcode

Mortgage Account Number

2 [Continue](#)

- 1 On the 'Create Case' page, you'll be required to complete all the 'Applicant Details' fields. You should use the account numbers linked to the property being transacted on.
- 2 Click 'Continue' to proceed.

Account Selection

Accounts Eligible to be Switched

Account Number	Existing Balance	Existing Product	Expiry Date	Current Monthly Payment	New Product	New Monthly Payment
61345903068	£19,236.59	Base Mortgage Rate	30/11/2046	£79.53		

1 [Choose Product](#)

This screen will display all accounts eligible for a rate switch and will ask you to choose a product to switch to.

- 1 Click 'Choose Product' to switch the account to a new product.

Remember: You can switch up to 4 accounts per rate switch application online

NFI Online
Building Society Secure log on: Hannah Intermine

Applicant(s): Miss K Water Case Id: M650371303 My Home Case Home Case Update

Illustration
DIP
Reserve Product
FMA
Rate Switch
Rate Switch Loan Selection
Product Filters
Product Selection
Intermediary Advice & Fees
Fee Payment Options
Product Start Date
Final Steps

Product Selection

Can't find the product you're looking for? [Click here](#)

Mortgage Account To Be Switched

Account Number	Outstanding Balance	Term (years)	Term (months)	Current Monthly Payment
60613559040	£43,843.60	7	6	£151.33

The below products have been filtered as per your selection on the Product Filters screen, select a product to continue. If you'd like to view different products, please revisit the Product Filters screen.

Select two products to compare their features.

Eligible Products List

Product Code	Product Description	APRC	Initial Interest Rate	Booking Fee	Product Fee	Monthly Payment	
541774	5 Year Base Rate Tracker	3.3%	2.24%	£0.00	£999.00	£81.84	<input type="checkbox"/>
541968	5 Year Fixed Rate	2.9%	2.19%	£0.00	£0.00	£80.01	<input type="checkbox"/>
541891	3 Year Fixed Rate	3.4%	2.14%	£0.00	£0.00	£78.19	<input type="checkbox"/>
541814	2 Year Fixed Rate	3.7%	1.99%	£0.00	£0.00	£72.71	<input checked="" type="checkbox"/>
541622	5 Year Fixed Rate	3.1%	1.99%	£0.00	£999.00	£72.71	<input type="checkbox"/>
542028	2 Year Base Rate Tracker	3.6%	1.94%	£0.00	£0.00	£70.88	<input type="checkbox"/>
541557	3 Year Fixed Rate	3.6%	1.84%	£0.00	£999.00	£67.23	<input type="checkbox"/>
541492	2 Year Fixed Rate	3.9%	1.59%	£0.00	£999.00	£58.09	<input type="checkbox"/>
541733	2 Year Base Rate Tracker	3.9%	1.54%	£0.00	£999.00	£56.27	<input type="checkbox"/>

Version: 8.0.0.01

- 1 If you would like to amend your chosen product filters, you can click 'Start Again' to return to the 'Account Selection' page which will clear any selection that has been made on the chosen account.
- 2 Alternatively, select a product from the list and continue to next page where you will select the Product Start Date.

NFI Online
Building Society Secure log on: Austin Ebodili

Applicant(s): Mrs L Brownmsk & Mrs C Cobb... Case Id: M671405241 My Home Case Home Case Update Save and Exit Log out

Illustration
DIP
Reserve Product
FMA
Rate Switch
Final Steps
Rate Switch Offer

Rate Switch Offer

You can view and print the Rate Switch offer below. Once the application has been submitted, a copy of the offer will be posted to the applicant(s).

Confirm Consent

Please confirm that all applicants have seen the Rate Switch offer and consent to this application.

Yes No

Select 'Submit' to submit this Rate Switch application.

Amend Case

Version: 8.0.0.01 Your progress Page Id: F159962

- 1 Once you've chosen your Product Start Date the 'Rate Switch Offer' page will prompt you to 'View Offer'. This will allow you to view and print the offer instantly.
- 2 You'll need to confirm that the applicants have seen the mortgage offer and consent to the rate switch.
- 3 Click 'Submit' to submit your application.

Remember: The product will only be reserved and the application fully submitted once you select 'Submit'.